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Polish Agriculture and the Consumer

Mexico Imports More U.S. Oilseeds

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In this issue:

2 Expectations of Polish Consumers Are at Odds With Recent Farm Record

4 Mexico Boosts Imports of U.S. Soybeans and Cottonseed To Fill Oil and Meal Gap
By Calvin C. Spilsbury

6 The Caribbean: A Promising Market for U.S. Wheat Exports
By Winn Tuttle and Edward F. Seeborg

8 U.S. Chilled Beef Gets Warm Welcome in Japan

9 Crops and Markets

This week's cover:

Canned hams ready for export are displayed at a Polish meatpacking plant. The role of meat exports in Poland's agriculture is discussed in an article beginning on this page.

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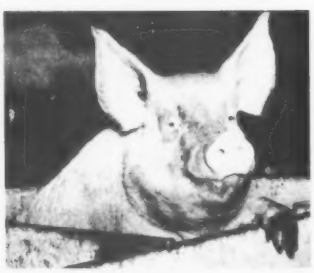
A farmer and his helper harvest rye on private farm in central Poland. Winterkill and spring floods last year, combined with a cool and wet summer, resulted in a poor Polish harvest in 1970.

Expectations of Consumers Are With Recent



Polish swine, such as the hog at left, are fed for slaughter at industrial fattening centers.

Polish at Odds Farm Record

By COMMUNIST AREA ANALYSIS GROUP
Foreign Regional Analysis Division
Economic Research Service

In their reaction to recent price increases and continuing meat exports, Polish citizens apparently considered purchasing power and consumer expectations more important than long-term agricultural performance. In fact, however, Poland's agricultural record has improved on a long-term basis.

Averaging about 3 percent annually, the long-term agricultural growth trend for Poland has been steeper than for most major developed countries. With a prolonged drought in 1969 and severe winterkill in 1970, however, Polish agricultural output fell below trend in the past 2 years.

Thus, although the agricultural trend has been upwards in the long run, it has declined in the short run. For example, the 1970 goal for per capita meat consumption was almost reached in 1967. There was no improvement during 1968-69, however, and per capita consumption probably fell in 1970.

The winterkill and spring flooding of 1970, followed by a cool, wet summer, resulted in Poland's below-average grain crop. However, potato and forage production did recover from the drought-reduced level of 1969.

Total domestic grain and potatoes [1] available for feed during 1970-71 are estimated down roughly 1.5 million tons from the previous year. However, the increased forage crop and domestic oilseed crush in 1970 have helped offset some of the decline in grain output.

Grain imports, which were about 2.5 million tons in 1969-70, will likely be higher in 1970-71. The Soviet Union has promised to supply 2 million tons of grain, compared with an estimated 1.5 million in 1969-70. Because of a decline in hog and cattle inventories, grain imports are not expected to increase as much as the decline in grain and potato availabilities. Furthermore, Poland's ability to import grain from Western countries is limited by the shortage of meat, Poland's major earner of hard currency.

The poorer feed situation and reduced livestock inventories have led to lower production and marketings of livestock and meat. During January-July 1970, Government purchases compared favorably with those of the previous year. Since July, however, purchases have declined, with October 1970 purchases 17 percent below those of October 1969.

The tight meat situation is not likely to be eased by a further decrease in exports. In 1969, exports of all types (fresh, salted, and canned) totaled 176,000 tons—about 8 percent of Poland's total meat output. A portion of this was offset by imports of 36,000 tons—largely fresh or frozen pork. By September 1970, exports were down 12,000 tons from the level of the first 9 months of 1969, and imports were up by 2,000 tons. Furthermore, prior to the change in Polish leadership, Party Secretary Gomulka stated that exports could not be reduced further due to hard currency payment obligations; and the new leadership has not announced any change in this policy. Almost all Polish meat exports are shipped to hard currency countries.

Increased meat imports are likely during 1970-71. In recent years, about half of Poland's meat imports have originated in Mainland China, and the remainder have come from various East European and Scandinavian countries.

Despite some relief provided by meat imports, Poland's per capita meat consumption is expected to be down in 1970 and to continue at a lower level in 1971 than in the past few years. Meat consumption was planned to increase modestly during the 1966-70 5-year plan—from about 108 pounds per capita in 1965 to 117-121 pounds by 1970. This goal is about three-fourths of the West German consumption level, but about average for other Eastern European countries. Following increases in 1966 and 1967, however, Polish consumption leveled off at about 115 pounds per capita, failing to keep pace with the increasing demands of consumers with growing incomes.

The meat price increases of December and general realinement of prices on a variety of consumer goods were set forth in preparation for the enactment of an economic reform program in 1971. Prices, on the average, increased about 18 percent on meat and meat products and 16 percent on flour, but decreased on household appliances and certain other consumer goods.

(Continued on page 12)

Left, meat hogs at a State center of animal breeding in southern Poland. An important export product, hogs are bred and fattened-for lean, light, and tender meat found in top quality hams.

[1] 4 tons of potatoes assumed to equal 1 ton of grain.

Mexico Boosts Imports of U.S. Soybeans and Cottonseed To Fill Oil and Meal Gap

By CALVIN C. SPILSBURY
Fats and Oils Division
Foreign Agricultural Service

Mexico, in its efforts to replenish critically low supplies of both vegetable oils and protein feeds, has found its neighbor to the north an ideal source of soybeans and cottonseed and of their oils and meals. In crop years 1969 and 1970, Mexico's total oilseed production was at the crisis level; production of cottonseed, the major oilseed, was around one-third below the 1962-66 average, as a result of the damage done to cotton production by drought, the pink bollworm, and prices below expectations.

Helping Mexico fill its fats and oils gap, the United States in the marketing year beginning October 1969 supplied over 5 million bushels of soybeans, 41.5 million pounds of cottonseed, 18.2 million pounds of edible soybean oil, and 33.8 million pounds of edible cottonseed oil. From these U.S. supplies Mexico was able to increase total edible oil availability by 112 million pounds, or 2.2 pounds per capita, and thus to maintain edible fats and oils consumption at around 23 pounds per capita—the normal level of consumption for Mexico's 50 million people in recent years. Protein feed supplies from U.S. exports of both soybeans and cottonseed were increased by over 120,000 metric tons; of this, over 110,000 was soybean meal, which is greatly needed by Mexico's growing poultry and hog industries.

Recent purchases by Mexico of U.S. oilseeds and protein meals, for December-January delivery, were 16.5 million pounds of cottonseed, 1.5 million bushels of soybeans, 15,000 tons of cottonseed meal, and 30,000 tons of soybean meal.

Soybean meal has been in tight supply for Mexico's poultry industry (both broiler and layer). Even with the addition of these import quantities and similar or even larger quantities that will probably be purchased in February 1971, it is believed that the Mexican soybean crush (anticipated at 200,000 tons) will still not supply adequate soybean meal for all of Mexico's needs, and additional supplies may be needed later in the year before the 1971 soybean harvest. During the rest of the year, it is expected that Mexico will obtain over 100,000 tons of soybeans and cottonseed meal and around 77 million pounds of vegetable oils from the United States, or the equivalent in oilseeds.

Present reports indicate that in the 1971 crop year Mexico will experience some recovery in oilseed production. However, with annual growth rates of 3.5 percent in population and (the result of rising incomes) 5 percent in edible fats and oils consumption, it appears that Mexico will have a long-term oil shortage. In relieving this chronic deficit, as well as in helping meet the protein needs of Mexico's livestock, U.S. oilseeds may well have an important part to play.

Background of Mexico's current need for vegetable oils and protein is the 2-year slump in its oilseed production beginning in crop year 1969, due to prolonged drought followed in many areas by heavy and unseasonable rains and flooding. Cotton—and thus cottonseed, the principal oilseed crop—was hard hit in both years. Plantings of soybeans, which follow those of wheat in the same area, were up in both 1969 and 1970. But, although wheat production rose, soybean production declined somewhat in 1970, because of low yields resulting from lack of water for irrigation. Fortunately, production of safflowerseed and sesameseed increased markedly in 1970. As a result, total vegetable oil production for the 1970 crushing season is expected to exceed 400,000 tons, instead of falling as drastically as the heavy loss in cottonseed production at first indicated.

For next year's oilseed crops, the outlook varies. Prospects for **cottonseed** are not especially good, as a result of high cotton production costs, low cotton prices a year earlier, and damage from pink bollworm. In the heavy production areas, particularly the northwest States of Sonora and Sinaloa, farmers have expressed a desire to plant other oilseeds and wheat, as a result of declining returns from cotton and the alltime high cost of cotton production. Unless they receive help in the form of cheaper fertilizers and pesticides, special credit, lower taxes, and other Government benefits—all backed by an optimistic price out-

MEXICO'S PRODUCTION OF OILSEEDS

Oilseed	Crop year				
	1967-68	1968-69	1969-70	1970-71	1971-72[1]
	1,000 tons	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*
Cottonseed	725.4	908.2	646.0	572.0	650.0-750.0
Safflowerseed	64.4	142.2	167.7	268.0	400.0
Soybeans	121.3	269.7	298.8	250.0	250.0-300.0
Sesameseed	140.0	130.0	98.0	180.0	150.0
Copra, palm kernel	118.0	118.8	118.8	130.0	130.0
Sunflowerseed	—	—	—	—	30.0
Flaxseed	4.3	9.4	11.4	30.0	25.0
Peanuts	8.9	7.8	7.8	7.0	7.0
Other	11.2	15.6	16.3	13.6	13.0
Total	1,193.5	1,601.7	1,364.8	1,450.6	1,655.0-1,805.0

[1] Estimated. Compiled from information submitted by Asociación Nacional de Industriales de Aceite y Mantecas Comestibles; Anderson, Clayton Co., S.A.; and others.

U.S. EXPORTS OF OILSEEDS AND THEIR PRODUCTS TO MEXICO

Year [1]	Soybeans and products: Beans	Oil	Meal
	1,000 bu.	*1,000 lb.*	*1,000 short tons*
1965	23	290	27
1966	259	116	17
1967	308	11,332	3
1968	824	4,168	1
1969 [2]	5,004	18,189	5

Year [1]	Cottonseed and products: Seed	Oil	Meal
	1,000 lb.	*1,000 lb.*	*1,000 short tons*
1965	1,938	15,419	(3)
1966	2,713	30	(3)
1967	2,132	23	0
1968	3,248	6	(3)
1969 [2]	41,524	33,820	2

[1] Marketing year beginning October. [2] Preliminary. [3] Less than 500 tons. Bureau of the Census.

look—the trade and most oil operators do not believe cotton area will rise much in 1971, despite Government requests for increased plantings.

Another problem facing cotton farmers is that they have had trouble in recent years getting their cotton picked, since labor is short and picking machines are not yet much used.

The production of **safflowerseed,** in contrast to that of cottonseed, is proving highly profitable to Mexican farmers, especially in Sonora and Sinaloa. Mexico's total 1970 crop of more than 268,000 tons was over four times that of 1967. Acreage has expanded steadily, from 284,000 acres in 1967 to 475,000 in 1970. Farmers can plant only one safflower crop a year (unlike wheat and soybeans, which they can double-crop); but yields are increasing, and although they average around a half ton to an acre, some have exceeded a ton. Also, prices were favorable in 1970. Therefore, the outook for increased plantings in 1971 has been reported as highly optimistic, and production may reach 400,000 tons.

Soybeans have provided a major new profitable crop in Mexico since 1959. Production has increased rapidly in recent seasons (except for 1970, when drought reduced crops). Output for 1971 is projected at 250-300,000 metric tons—more than 2 to 2½ times the 121,300 tons of 1967. Most soybeans are grown on the irrigated land of Sonora (particularly in the Yaqui Valley) and Sinaloa, in rotation with wheat and often with cotton, if there is enough irrigation water.

Planting time for wheat is in November and December, with harvesting in May. After the wheat harvest, soybeans are sown as fast as the land can be prepared, for harvesting in September and October by modern combines. A promising new soybean variety developed in Mexico, "Cajeme," is planted between April 15 and June 15 in Sonora, the major production area. Several southern U.S. varieties—Lee, Hood, Davis, Dare, and Hill—have been succesfully raised, with yields of 1 to 1.2 tons per acre. Cost of production has been estimated at around $71 per acre in Sonora; and with an average yield of 0.72 ton and returns estimated at around $144 per ton, an average profit of about $32 per acre has been evident. This, coupled with wheat income, has given farmers an incentive to continue soybean production.

Mexico's expanding 2-million-ton feed industry provides a rapidly growing market for soybean meal, which domestic soybeans cannot satisfy. Poultry feeds containing from 10 to 30 percent soybean meal are the major item of production at most plants, and total mixed-feed production is rising at around 8½ percent each year.

The country will be about 150,000 tons short of soybean meal during 1970-71; total demand for feeds could well be over 350,000 tons, while less than 200,000 will be crushed from domestic supplies. Broiler feeds and layer feeds alone will require nearly 250,000 tons of soybean meal, while hog feeds and other types of feeds will require over 100,000 tons of soybean meal and other protein.

Mexico had an annual slaughter in 1969 of 110 million head of poultry, including over 75 million broilers and 40 million overage layers. The industry is growing at a rate of between 8½ and 10 percent for broilers and 5 to 8 percent for layers.

Soybean meal (49-50 percent protein) is used at rates of up to 30 percent, but the average rate is around 15 percent in poultry feeds, combined with around 5 percent fishmeal. Soybean meal constitutes over 15 percent of broiler feed tonnage and 7-10 percent of mixed layer feeds. Conversion ratios for broilers have been running as low as 2.2 pounds of feed to 1 pound of meat produced. Poultry feeds usually contain about 1 percent fat.

The commercial hog industry that has developed in Mexico since 1958 has adopted U.S. and European hog types and U.S. soybean meal feeds, with the result of improved feed efficiency and more hogs per litter. Hog meat output was about 264,000 metric tons in 1969, and hog numbers will be near 12.5 million in 1971, compared with 11.7 million in 1969 when 4.4 million head were slaughtered.

Some feed mixers have indicated that they expect to see a tremendous growth in the Mexican hog industry. The general rate of growth in the sale of soybean-meal hog feeds is around 10 percent per year, but these mixers feel that a growth rate of 20 or 30 percent is not unreasonable.

MEXICO'S PRODUCTION OF VEGETABLE OILS

Type	Crushing season: 1967-68	1968-69	1969-70	1970-71
	1,000 tons	*1,000 tons*	*1,000 tons*	*1,000 tons*
Cottonseed	112.0	158.0	116.0	93.6
Safflowerseed	51.0	23.2	60.4	92.7
Sesameseed	66.0	60.0	45.0	81.0
Soybean	21.8	48.6	54.0	45.0
Corn	3.5	3.6	3.7	8.0
Peanut	4.0	4.9	5.0	1.7
Rapeseed	2.6	3.7	4.5	1.4
Linseed	1.5	3.2	4.0	11.4
Coconut, palm kernel	74.0	74.0	74.0	74.1
Total	336.4	379.3	366.6	408.9
Per capita consumption:	*Pounds*	*Pounds*	*Pounds*	*Pounds*
Total oil	16.2	17.7	16.5	17.8
Edible oil [1]	13.7	15.2	14.1	15.1
Deficit, edible [1]	1.3	.8	2.9	2.9

[1] Estimated.

A bakery worker in El Salvador loads fresh loaves of bread baked with wheaten flour onto an automatic slicing and wrapping machine.

The Caribbean: A Promising Market for U.S. Wheat Exports

By WINN TUTTLE
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EDWARD F. SEEBORG,
Grain and Feed Division
Foreign Agricultural Service

Situated on the southern doorstep of the United States is a clutch of independent countries that rim the Caribbean Sea from Guatemala south and eastward to Panama or dot the water's surface. These are the nations of Central (or Middle) America—Barbados, Costa Rica, Cuba, the Dominican Republic, El Salvador, Guatemala, Haiti, Honduras, Jamaica, Nicaragua, Panama, and Trinidad and Tobago. Additionally there are several other islands and mainland areas that are affiliated politically with Britain, France, and the Netherlands.

Although the Central American countries (and the nearby islands) have linguistic and cultural ties with Europe, and do much of their trading with the Continent, many of the area's 30 million inhabitants also look north toward the United States for markets and goods. And farmers there export a large share of their tropical products to this country, particularly coffee and bananas.

These Caribbean nations are small, but in terms of dollar purchases they are bigger U.S. customers than mere size denotes.

U.S. exports into the area in 1969 totaled $1.3 billion. The area's six top industrial imports (in millions of dollars) in 1969 were: Motor vehicles ($94.8), electrical machinery and appliances ($90.1), paper, paperboard, and manufactures of paper ($66.6), chemical elements and compounds ($63.2), construction machinery ($28.3), and agricultural machinery and implements ($26.5).

Total U.S. agricultural exports to the area in 1969 came to $185.6 million. Among these, wheat and wheat flour played major roles.

During 1967-69, for example, the Caribbean area imported a yearly average of 496,000 metric tons of wheat, 92.5 percent of which came from the United States and was valued at $30 million. Only 25.3 percent of the area's 349,000 metric tons of wheat flour came from the United States during this period, but the value was $21 million. Other major flour suppliers were Western Germany, France, and Canada, each of the three dividing the remainder of the market nearly equally between them.

The Caribbean area's general trend in the past decade has been upward for wheat and downward for flour. During 1967-69, wheat imports averaged 42 percent higher than those of flour. This is in sharp contrast to the ratio in the early part of the 1960's when the region's flour imports were 90 percent of the total, and wheat imports made up the balance.

Based on a 10-year review for the area, U.S. exports of wheat as grain are expected to continue upward, but U.S. flour shipments may taper off. The advance of industrialization in the area will be largely responsible.

As manufacturing and industrial facilities develop in the area, per capita incomes will rise. It is likely that, as a result of rising living standards, consumers will become more sophisticated and wheat will tend to replace corn as a staple in many countries. With this growth in wheat demand will come an accompanying increase in the number of domestically operated flour mills. If this transpires, it means that prospects for an increase in U.S. grain sales in the Caribbean will improve, while the future of U.S. wheat flour exports into the area appears less bright at the present time.

Per capita consumption of wheat and wheat products varies markedly from country to country in the islands and lands of the Caribbean region. From a high of 181 pounds per resi-

dent for Trinidad and Tobago, consumption tumbles to a low of slightly over 31 pounds for Honduras. The combined usage of wheat for the southern Caribbean region—made up of most minor islands in the Caribbean under jurisdiction of Britain, France, and the Netherlands—is about 160 pounds per person—even higher than per capita consumption of wheat and wheat products in the United States.

Eating habits, availability of alternate foods, and prices of wheat foods compared with those of competing cereals, beans, and plantains are among factors that account for wide differences in wheat consumption in the Caribbean area.

The transition of Central American and Caribbean markets from flour to wheat—already well underway—has brought an improved overall U.S. share of the market. At present, this area imports all five classes of U.S. wheat, running from low-protein White and Soft Red Winter wheats, through medium-strength Hard Winter wheats, to premium high protein Hard Red Spring and durum wheats.

At present bakers in the area use more high-protein wheat because their baking methods are better fitted to this type. As they improve their techniques, it is believed the region's bakers will buy more Hard Red Winter wheat. At present, about 55 percent of U.S. exports to the Caribbean are Hard Red Spring wheat; an additional 24 percent is Hard Red Winter. This proportion appears to be gradually changing toward a higher percentage of Hard Red Winter as millers attempt to reduce the cost of milling blends and bakers improve their methods. Durum, a relative newcomer to millers, is imported for pasta products. Growth potential for these products is very good in the area.

There are several reasons why Central America and the Caribbean area have good potential for expansion as a U.S. market. U.S. wheat and wheat flour are familiar to Caribbean area millers, bakers, and pasta producers, and they know the United States is a reliable source of supply. Because of the area's familiarity with U.S. flour, millers are now importing U.S. wheat of the same type used in flour previously imported by bakers.

Millers and bakers can order from a large variety of U.S. wheat on guaranteed minimum or maximum specifications and be assured they will get regular deliveries of full or part cargoes at competitive prices. And it is easy for bakers and millers to get useful and timely market information and technical assistance on milling and baking methods from the United States.

An examination of several countries on the rim of the Caribbean Sea presents insight into the heterogeneity of the area's markets.

Guatemala is the only country in Central America that grows wheat, providing for about one-third of its total needs. The domestic milling industry can produce twice the amount of wheat flour now being consumed; flour prices are Government controlled. Mills get wheat from a Government agency under semiannual allocations. All imports are Government controlled and are determined by outturn of the domestic wheat crop.

The baking industry is of the cottage type with about 1,800 small manually operated and 25 partially or fully mechanized facilities. Corn products are a traditional and preferred food among the Indians who comprise 60 percent of the population.

Total flour consumption in Nicaragua is increasing at about 8 percent per year, more than twice population growth. Pasta products have only recently been introduced and appear to be gaining in popularity. Pasta is a good competitor of corn which is the main staple food, followed by rice, plantains, and beans. Two modern facilities dominate the milling industry and contrast with 415 manual bakeries. There's only one fully mechanized bakery in the country.

In El Salvador, two very modern flour mills produce about 270 tons of processed wheat products daily including bread, cookie, family, and pasta flours. One of the mills has a baking school and is conducting a small training program. Per capita consumption, currently about 35 pounds, is increasing by 4-5 percent annually. Wheat consumption, is, however, closely related to the price of corn and to the incomes of workers on coffee plantations in the country.

The islands situated east and southeast of Puerto Rico comprise a group known generally as the Lesser Antilles, grouped into the Leeward Islands at the northern end and Windward Islands at the southern, and terminating off the northeastern coast of Venezuela. Trinidad and Tobago—major wheat and flour consumers—are located off the southern extremity of these islands. Barbados is nearby.

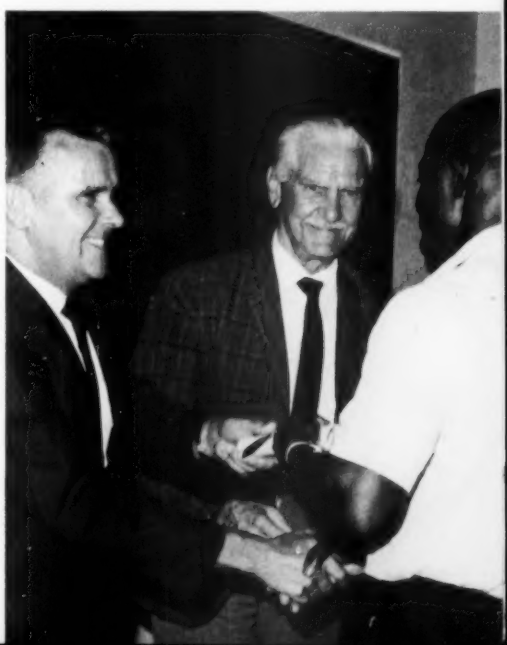
The market for wheat and wheat flour in these islands, having a total population of only 3.6 million, is in excess of 300,000 metric tons annually in wheat equivalent.

Per capita consumption of wheat products there is about 190 pounds per year, in sharp contrast to the average of 35 pounds per year consumed in Guatemala, Honduras, El Salvador, and Nicaragua. Eating habits based on wheat flour products instead of on corn, rice, beans, and plantains are the major reason for this vast difference in per capita consumption.

As new flour mills are constructed, imports by these islands will shift from processed flour to wheat, cutting into U.S. exports of flour but—based on past experience—more than compensating by increased U.S. wheat imports. This country's share of the market should improve markedly from its current level of about 25 percent in the southern Caribbean.

Times are changing in these Central American and Caribbean island markets and these changes are bringing increased market opportunities for U.S. wheat growers and exporters. Each year more U.S. wheat ends up as bread or some other nutritious food on the tables of consumers in these next-door countries.

Graduate (right) of Trinidad seminar on bakery improvement gets diploma from U.S. agricultural attaché (left).



U.S. Chilled Beef Gets Warm Welcome in Japan

In the past 3 months Japan has imported almost 400,000 pounds of a product brand new to its food market —fresh chilled U.S. beef carcasses. The first cargoes arrived in November and December of last year, more were ordered in early January, and further shipments are expected to follow soon.

The chilled beef, intended both for Japan's booming retail food trade and for hotel customers, is transported in refrigerated containers by ship from the west coast of the United States to the ports of Kobe and Tokyo in Japan. From slaughter in the United States to delivery to Japanese warehouses takes just over 2 weeks, during which the beef is kept between 28° and 32° F. to maintain freshness and flavor.

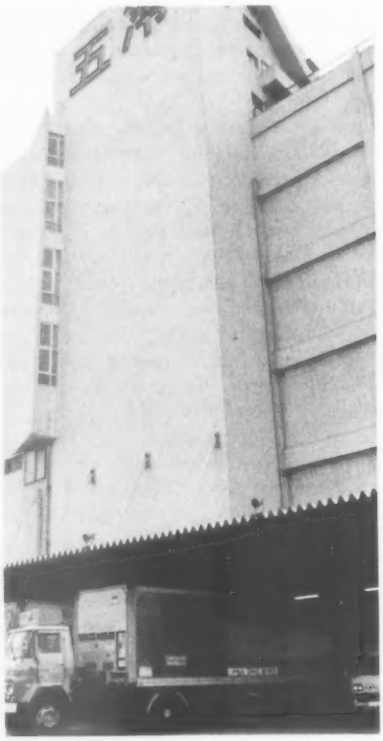
The first of the shipments of the fresh chilled beef totaled 75,000 pounds of U.S. Prime and Choice carcasses and was purchased by the Japanese importing houses Kanematsu-Gosho and Marubeni-Iida. Shipping costs were underwritten by the Japan Meat Conference, an organization with Government affiliations.

Arrival of the beef was celebrated by a luncheon at which guests included officials of the Japanese Ministry of Agriculture and Forestry; top executives of the All-Japan Federation of Meat Dealers' Associations, the Tokyo Meat Dealers' Association, the All-Japan Meat Wholesalers' Association, the Japan Meat Conference, and the Meat Importers' Association; representatives of independent wholesalers, restaurants, hotels, trading firms, supermarkets, and the press; and American Embassy officials. Diners had a taster's choice of steak, roast beef, and sukiyaki.

The innovation of U.S. sales of fresh chilled carcasses in addition to frozen beef cuts could lead to substantial expansion of the already fast-growing Japanese market for U.S. beef. (Japanese imports of U.S. frozen beef cuts grew from nearly nothing in 1967 to well over 800,000 pounds in 1970. This trade began after promotional efforts initiated by the Livestock and Meat Products Division of the Foreign Agricultural Service.)

The earlier frozen beef shipments were of boneless strip loins and oven-ready rib cuts and were used exclusively by hoteliers to serve to wealthy patrons. Chilled beef carcasses have more flexibility in merchandizing. They can be divided in Japan into the expensive hotel items plus less expensive portions (cut Japanese style) that will please Japanese retail shoppers.

Some other factors will also help U.S. sales of fresh beef. Japanese like American beef, which is similar in quality and flavor to the famed Kobe beef except that it is slightly leaner. In addition, U.S. chilled beef carcass prices, even after duties and shipping charges, compare favorably to prices of high-quality beef raised in Japan. Finally, in a land where present beef consumption is a low 5 pounds per person annually, rising disposable incomes and gradual changes to more Western-style diets are likely to give a powerful push to beef consumption.



Top left, refrigerated containers of first U.S. chilled beef shipment arrives at Igarashi warehouse. Bottom left, unloading and inspecting carcasses. Below, diners at celebration lunch.

CROPS AND MARKETS

Grains, Feeds, Pulses, and Seeds

Weekly Rotterdam Grain Prices and Levies

Current offer prices for imported grain at Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	Jan. 20	Change from previous week	A year ago
	Dol. per bu.	*Cents per bu.*	*Dol. per bu.*
Wheat:			
Canadian No. 2 Manitoba	2.08	0	2.00
USSR SKS-14	2.05	0	1.78
Australian FAQ	1.88	0	1.70
U.S. No. 2 Dark Northern Spring:			
14 percent	2.10	+4	1.90
15 percent	2.13	+3	1.96
U.S. No. 2 Hard Winter:			
13.5 percent	2.00	+2	1.76
USSR-441 Yellow Winter	1.93	−2	(1)
Argentine	(1)	(1)	1.75
U.S. No. 2 Soft Red Winter	1.94	+4	1.65
Feedgrains:			
U.S. No. 3 Yellow corn	1.83	0	1.51
Argentine Plate corn	1.87	+1	1.49
U.S. No. 2 sorghum	1.64	+2	1.47
Argentine-Granifero sorghum	1.59	−1	1.25
Soybeans:			
U.S. No. 2 Yellow	3.43	+11	2.95
Import levies:			
Wheat	1.40	0	1.74
Corn	.62	−1	.91
Sorghum	.73	0	.89

[1] Not quoted. Note: Basis—30- to 60-day delivery.

Canada Raises Grain Quotas

The Canadian Wheat Board recently announced increases in delivery quotas for wheat, barley, and rapeseed.

The general wheat quota is now 3 bushels per quota acre instead of 2 in all shipping blocks. As a result, the advance quota on durum of 1 bushel per quota acre has been discontinued.

For barley, a general increase from 10 to 15 bushels per quota acre was made in all shipping blocks. However, applications submitted on behalf of producers for the delivery of a second carlot of selected two-row varieties of barley in excess of the established quota will now be considered by the Board. For a producer to be eligible for the special delivery privilege, a representative sample of his barley must have been accepted by a malfster or shipper as suitable for malting or pearling, on a premium basis.

An increase of 3 bushels per quota acre in the advance quota has been authorized for the delivery of rapeseed to processing mills. The increase, which raises the advance quota to 15 bushels per quota acre, is designed to provide processing mills with the additional stocks needed to meet their crushing requirements.

A general increase from 5 to 10 bushels per quota acre for oats was announced for all shipping blocks in the three Prairie Provinces and all delivery points in British Columbia.

Tobacco

U.S. Tobacco Imports Steady in November

U.S. imports of unmanufactured tobacco for consumption (duty-paid withdrawals from Customs' bonded warehouses for manufacture) were 16.8 million pounds in November 1970, compared with 17.2 million pounds in November 1969. The imports were valued at $10.2 million, about the same as in November 1969.

Imports for January-November continued to exceed those for the same 11 months a year ago. The total quantity was 203.9 million pounds, valued at $119.6 million, compared with 195.3 million pounds at $118.9 million in 1969. However, the current consumption rate is down from the high level of 206 million pounds and $133 million for the 11-month period in 1968.

U.S. IMPORTS OF UNMANUFACTURED TOBACCO
[For consumption]

Period and kind	1969		1970	
	Quantity	Value	Quantity	Value
	1,000 pounds	*1,000 dollars*	*1,000 pounds*	*1,000 dollars*
January-November:				
Cigarette leaf (flue & burley)	4,322	1,436	7,758	2,043
Cigarette leaf, other	133,541	90,211	131,847	88,086
Cigar wrapper	443	1,571	558	2,351
Mixed filler & wrapper	317	1,378	235	1,010
Cigar filler, unstemmed	2,190	1,980	2,855	2,354
Cigar filler, stemmed	2,290	2,972	2,474	3,214
Scrap	51,104	19,178	57,823	20,551
Stems	1,092	199	391	29
Total	195,299	118,925	203,941	119,638
November:				
Cigarette leaf (flue & burley)	0	0	70	14
Cigarette leaf, other	11,113	7,471	11,548	7,694
Cigar wrapper	47	151	35	134
Mixed filler & wrapper	15	90	21	87
Cigar filler, unstemmed	120	133	81	180
Cigar filler, stemmed	189	231	181	251
Scrap	5,639	2,026	4,752	1,810
Stems	80	9	68	9
Total	17,203	10,111	16,756	10,179

Bureau of the Census.

U.S. general imports of unmanufactured tobacco (arrivals) continued to lag. Imports for January-November 1970 were 199 million pounds, valued at $101.8 million, compared with 215 million pounds at $110 million in the same period of 1969. However, arrivals of cigarette leaf (flue and burley) continued to increase; they were 16 million pounds during January-November 1970, compared with 13.8 million pounds in the same period of 1969.

U.S. GENERAL IMPORTS OF UNMANUFACTURED TOBACCO

Item	1969		1970	
	Quantity	Value	Quantity	Value
	1,000 pounds	*1,000 dollars*	*1,000 pounds*	*1,000 dollars*
January-November:				
Cigarette leaf (flue & burley)	13,772	4,741	16,031	5,209
Cigarette leaf, other	125,598	79,008	113,558	69,625
Cigar wrapper	557	1,757	575	2,329
Mixed filler & wrapper	570	2,249	1,029	2,387
Cigar filler, unstemmed	35,510	10,897	32,402	11,175
Cigar filler, stemmed	2,246	2,440	2,815	3,187
Scrap	35,815	8,841	32,644	7,821
Stems	1,052	24	273	22
Total	215,120	109,957	199,327	101,755
November:				
Cigarette leaf (flue & burley)	353	233	603	195
Cigarette leaf, other	1,385	656	5,203	2,754
Cigar wrapper	20	78	10	38
Mixed filler & wrapper	14	23	70	247
Cigar filler, unstemmed	2,433	754	1,574	522
Cigar filler, stemmed	177	224	191	180
Scrap	6,639	1,248	2,868	632
Stems	27	1	15	1
Total	11,048	3,217	10,534	4,569

Bureau of the Census.

Fruits, Nuts, and Vegetables

Iran Has Bumper Dried Fruit Crop

Iran reports that favorable weather is largely responsible for the bumper 1970 dried fruit crop. Dried fruit production is estimated at 409,000 short tons, 12 percent above the 1969 level and 9 percent above average. Date production is currently estimated at 330,000 tons, the largest crop since 1963. The raisin crop equaled the large 1968 production and the apricot crop was the largest in recent years.

Larger total dried fruit exports are forecast during the 1970-71 season. Raisin exports are expected to double those of the short 1969-70 season, while exports of dates are expected to approximate last season's. West Germany, Russia, the United Kingdom, East Germany, and Czechoslovakia are the main export markets for Iranian raisins. Major date markets are the Middle Eastern countries, India, Russia, and the United States.

IRANIAN DRIED FRUIT PRODUCTION AND EXPORTS

Item	Production			Exports		
	1968-69	1969-70	1970-71[1]	1968-69	1969-70	1970-71[2]
	1,000 short tons	*1,000 short tons*	*1,000 short tons*	*1,000 short tons*	*1,000 short tons*	*1,000 short tons*
Dates	309.0	320.0	330.0	23.4	33.0	33.0
Raisins	66.0	39.0	66.0	43.5	22.0	44.0
Apricots	9.4	7.2	13.0	9.1	6.6	11.0
Total	384.4	366.2	409.0	76.0	61.6	88.0

[1] Preliminary. [2] Forecast.

Fats, Oils, and Oilseeds

U.S. Edible Oils, November Exports

November exports of U.S. soybean oil declined sharply to 58 million pounds from the 112.7 million exported in the previous month and the 114.1 million exported in November 1969. Due to the heavier exports in October, however, the total for the first 2 months of the marketing year, at 170.7 million pounds, remained slightly ahead of exports in

U.S. EXPORTS OF EDIBLE OILS

Item and country of destination	November		Oct.-Nov.	
	1969[1]	1970[1]	1969[1]	1970[1]
Soybean:[2]	*Mil. lb.*	*Mil. lb.*	*Mil. lb.*	*Mil. lb.*
Yugoslavia	0	0	(3)	37.6
Pakistan	78.3	.6	78.3	27.1
Israel	8.3	13.5	11.1	15.7
Morocco	1.3	1.8	2.1	11.8
Peru	3.4	9.5	3.4	9.8
Chile	1.9	.7	1.9	8.5
India	7.0	3.6	13.0	8.3
Iran	0	2.5	(3)	8.2
Canada	3.5	3.7	5.0	7.7
Haiti	.5	1.4	2.2	4.3
Panama	(3)	3.7	.3	3.8
Colombia	.9	2.8	2.7	3.3
Jamaica	1.0	2.9	1.9	3.0
Dominican Republic	1.8	.6	5.5	1.0
Mexico	.8	(3)	2.7	.4
Tunisia	.4	.2	22.3	.2
U.A.R.	0	0	0	0
Mauritius	0	0	0	0
Others	5.0	10.5	16.9	20.0
Total[4]	114.1	58.0	169.3	170.7
Cottonseed:[2]				
Belgium-Luxembourg	0	0	0	0
France	0	0	(3)	0
Germany, West	0	0	2.7	0
Italy	0	0	(3)	0
Netherlands	3.0	0	3.2	0
Total EC[4]	3.0	0	5.9	0
Poland	0	7.4	0	7.4
Mexico	1.9	4.3	2.6	6.7
Canada	1.8	4.3	3.9	6.4
U.A.R.	0	0	22.0	4.7
Venezuela	9.8	1.1	17.7	2.2
Sweden	0	2.1	2.1	2.1
Iran	20.3	0	29.0	1.7
United Kingdom	(3)	0	(3)	0
Pakistan	13.7	0	13.7	0
Morocco	0	0	0	0
Dominican Republic	5.5	0	5.5	0
Others	.1	.1	2.1	.3
Total[4]	56.1	19.3	104.5	31.5
Total oils	170.2	77.3	273.8	202.2

[1] Preliminary. [2] Includes shipments under P.L. 480 as reported by Census. [3] Less than 50,000 lb. [4] Totals computed from unrounded data. Bureau of the Census.

October-November 1969. Commercial sales are estimated at 103.1 million pounds; Public Law 480 shipments at 50.2 million; donations and emergency relief at 17.4 million.

Only 19.3 million pounds of cottonseed oil were exported in November 1970 compared with 56.1 million in the same month the previous year. Since only 12.2 million pounds were exported the previous month, October-November exports were down to 31.5 million pounds from 104.5 million in 1969. Commercial sales are estimated at 30.6 million pounds, and the remaining 900,000 were shipped as donations by voluntary agencies.

U.S. Oilcakes and Meals, November Exports

Soybean meal exports, at 434,300 short tons in November 1970, exceeded November 1969 exports by 66,900 tons and boosted the October-November 1970 total to 715,300 tons.

The total for October-November 1970 is 9 percent, or 57,600 tons, higher than last year's total during the same period. Exports to Eastern Europe during October-November 1970 increased to 91,800 tons from 25,900 tons during the same period a year ago. Larger quantities were also taken by Ireland, Switzerland, and the Philippines. Exports to the Netherlands, however, declined 53,800 tons, lowering the total to the European Community to 510,600 tons from 522,300 tons in 1969. Exports to Spain also declined sharply from the level of the previous year.

October November 1970 exports of all cakes and meal totaled 743,900 tons compared with 698,800 tons in the preceding year. Less linseed meal was exported in the current marketing year.

U.S. EXPORTS OF CAKES AND MEALS

Item and country of destination	November		Oct.-Nov.	
	1969 [1]	1970 [1]	1969 [1]	1970 [1]
	1,000 short tons	*1,000 short tons*	*1,000 short tons*	*1,000 short tons*
Soybean:				
Belgium-Luxembourg	33.0	23.1	47.6	56.5
France	42.2	51.1	91.7	115.1
Germany, West	101.4	145.1	207.6	207.0
Italy	24.1	31.1	39.5	49.9
Netherlands	84.0	56.2	135.9	82.1
Total EC [2]	284.7	306.7	522.3	510.6
Canada	21.8	25.4	43.9	47.2
Yugoslavia	11.5	27.7	11.5	34.3
Bulgaria	0	12.2	0	22.0
Ireland	6.7	8.4	6.7	13.0
Czechoslovakia	0	9.3	0	12.7
Hungary	0	11.6	0	11.6
Poland	14.4	0	14.4	11.2
Switzerland	5.6	5.4	6.3	10.9
Philippines	8.2	4.4	9.3	10.2
Australia	3.7	2.2	5.1	5.1
United Kingdom	(3)	1.2	3.9	2.7
Spain	0	0	19.4	0.3
Japan	0.2	0	0.2	0
Others	10.6	19.8	14.7	23.5
Total [2]	367.4	434.3	657.7	715.3
Cottonseed	0.5	0.7	0.9	0.9
Linseed	16.6	9.4	40.2	27.7
Total cakes and meals [4]	384.5	444.4	698.8	743.9

[1] Preliminary. [2] Totals computed from unrounded data. [3] Less than 50,000 tons. [4] Includes peanut and small quantities of other cakes and meals. Bureau of the Census.

U.S. Soybean Exports in November

U.S. soybean exports in November 1970, at 45.3 million bushels, declined 16 percent, or 8.4 million bushels, from exports in November 1969. The September-November total, however, at 118.9 million bushels, decreased only 800,000 bushels from the previous year's exports during the same 3-month period.

Over 77 percent of the September-November 1970 exports were taken by the European Community, Japan, and Canada. Despite increased exports to West Germany and France, soybeans shipped to the EC declined 1.4 million bushels from 1969 exports. Fewer soybeans were also shipped to or via Canada in the first quarter of the new marketing year. Exports to Japan, however, reached 33.3 million bushels, an increase of 27 percent, or 7.3 million bushels, from the 1969 quarterly total.

U.S. EXPORTS OF SOYBEANS

Country of destination	November		Sept.-Nov.	
	1969 [1]	1970 [1]	1969-70 [1]	1970-71 [1]
	Mil.bu.	*Mil. bu.*	*Mil bu.*	*Mil. bu.*
Belgium-Luxembourg	4.4	1.1	7.8	4.2
France	.1	.9	.1	2.6
Germany, West	4.4	5.0	9.1	13.3
Italy	6.2	2.1	9.3	4.6
Netherlands	6.2	3.6	15.2	15.2
Total EC [2]	21.2	12.7	41.4	40.0
Japan	8.7	13.8	26.0	33.3
Canada	8.6	5.3	22.2	18.4
Spain	3.9	2.7	6.8	6.6
China (Taiwan)	2.6	1.5	5.3	6.0
Denmark	3.2	2.5	6.2	6.2
Israel	1.0	1.5	3.3	1.9
United Kingdom	1.5	.9	3.3	1.6
Others	3.0	4.4	5.1	4.9
Total [2]	53.7	45.3	119.6	118.9
	Mil. lb.	*Mil. lb.*	*Mil. lb.*	*Mil. lb.*
Oil equivalent	590.1	497.8	1,313.0	1,305.5
	1,000 short tons	*1,000 short tons*	*1,000 short tons*	*1,000 short tons*
Meal equivalent	1,266.6	1,068.5	2,818.5	2,802.5

[1] Preliminary. [2] Totals computed from unrounded data. Bureau of the Census.

Crops and Markets Index

Fats, Oils, and Oilseeds
10 U.S. Edible Oils, November Exports
11 U.S. Oilcakes and Meals, November Exports
11 U.S. Soybean Exports in November

Fruits, Nuts, and Vegetables
10 Iran Has Bumper Dried Fruit Crop

Grains, Feeds, Pulses, and Seeds
9 Weekly Rotterdam Grain Prices and Levies
9 Canada Raises Grain Quotas

Tobacco
9 U.S. Tobacco Imports Steady in November

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Foreign Agriculture

Poland's Recent Farm Record

(Continued from page 3)

The new Polish leadership has imposed a freeze on prices, but has not abrogated the recent increases. These higher prices will undoubtedly reduce Government subsidization of meat, but much of the impact will be offset by increased producer prices for livestock—in effect as of January 1, 1971—which were promised in an effort to halt farm herd reductions.

Although the price adjustments and feed imports will have a stabilizing effect on Poland's livestock situation, notable improvement in herds and meat supplies is not likely before late 1971. Some increase in imports is likely, but meat consumption will be restrained by the reduced production and higher prices.

Availability of Poland's Principal Feedstuffs and Livestock, 1969-70, 1970-71

Item	1969-70	1970-71[1]	Change
	Million metric tons	*Million metric tons*	*Percent*
FEEDSTUFFS			
Production:			
Grain	18.60	16.10	−13
Potatoes	44.90	49.00	+9
Rapeseed meal	.11	.22	+100
Imports:			
Grain[2]	2.5	3.0	+20
Feed availabilities:[3]			
From domestic production	15.3	13.8	−10
Total	17.8	16.8	−6
	Million head	*Million head*	*Percent*
LIVESTOCK			
Hogs	14.4	13.5	−6
Cattle	11.0	10.9	[4] −2

[1] Preliminary. [2] Estimated. [3] Grain and potatoes on a grain-equivalent basis. [4] Computed prior to rounding.

Production, Trade, and Consumption of Meat in Poland, 1960, 1966-70

Year	Production[1]	Exports			Imports	Per capita consumption
		Fresh	Canned	Bacon	fresh	
	1,000 metric tons	*1,000 metric tons*	*1,000 metric tons*	*1,000 metric tons*	*1,000 metric tons*	*Kilograms*
1960	1,646	25	37	48	12	42.5
1966	1,945	50	55	52	49	51.0
1967	1,974	62	57	55	40	52.3
1968	2,005	64	58	54	75	52.2
1969	2,079	71	55	50	34	52.6
1970[2]	2,020	60	55	45	40	51.0

[1] Including pork fat, but excluding variety meats. [2] Preliminary.